

## APPENDIX A

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1. **Patent Application/Serial No.:** 60/429,461  
**Title:** EXPORTABLE REPORT TEMPLATES  
**Filed:** 11/26/2002  
**Applicant:** Intuit Inc.  
**Reference No:** 37202/127001; 30010
2. **Patent Application/Serial No.:** 11/285,917  
**Title:** DISPOSABLE TAX RETURN  
PREPARATION DEVICE  
**Filed:** 11/23/2005  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 017281/0101  
**Reference No:** 37202/147001; 30022
3. **Patent Application/Serial No.:** 10/932,632  
**Title:** EXTERNALLY DEFINED  
APPLICATION CONFIGURATION  
**Filed:** 9/1/2004  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 015765/0311  
**Reference No:** 37202/137001; 30039

4. **Patent Application/Serial No.:** 10/821,774

**Title:** RECOVERY ACCESS TO SECURE  
DATA

**Filed:** 4/8/2004

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 015214/0697

**Reference No:** 37202/136001; 40098

5. **Patent Application/Serial No.:** 60/630,812

**Title:** MODEL-DRIVEN TAX APPLICATION  
FRAMEWORK

**Filed:** 11/23/2004

**Applicant:** Intuit Inc.

**Reference No:** 37202/138001; 40127

6. **Patent Application/Serial No.:** 11/285,930

**Title:** MODEL-DRIVEN USER INTERVIEW

**Filed:** 11/23/2005

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 017267/0343

**Reference No:** 37202/138002; 40127

7. **Patent Application/Serial No.:** 11/302,964  
**Title:** USER INTERFACE FOR DISPLAYING  
IMPORTED TAX DATA IN  
ASSOCIATION WITH TAX LINE  
ASSIGNMENTS  
**Filed:** 12/13/2005  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 017652/0143  
**Reference No:** 37202/148001; 40153
8. **Patent Application/Serial No.:** 11/077,047  
**Title:** SEARCH QUALITY DETECTION  
**Filed:** 3/9/2005  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 016387/0477  
**Reference No:** 37202/100001; 40177
9. **Patent Application/Serial No.:** 11/123,475  
**Title:** ESTIMATED TAX REMINDER AND  
PAYMENT FACILITATION SERVICE  
**Filed:** 5/5/2005  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 016542/0549  
**Reference No:** 37202/140001; 50239

10. Patent Application/Serial No.: 11/332,416  
Title: USER INTERFACE FOR LENIENT  
EXCEPTION FEEDBACK  
Filed: 1/13/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 017523/0100  
Reference No: 37202/149001; 50317
11. Patent Application/Serial No.: 11/270,910  
Title: DATABASE SERVER DISCOVERY  
USING A CONFIGURATION FILE  
Filed: 11/10/2005  
Applicant: Intuit Inc.  
Reel/Frame No.: 017231/0128  
Reference No: 37202/145001; 50328
12. Patent Application/Serial No.: 11/193,906  
Title: INTELLIGENT RECOILATION OF  
DATABASE TRANSFER ERRORS  
Filed: 7/28/2005  
Applicant: Intuit Inc.  
Reel/Frame No.: 017162/0355  
Reference No: 37202/141001; 50346

13. Patent Application/Serial No.: 11/218,769  
Title: FILTERED LIST ASSISTED ELEMENT SELECTION  
Filed: 9/2/2005  
Applicant: Intuit Inc.  
Reel/Frame No.: 017171/0536  
Reference No: 37202/142001; 50362
14. Patent Application/Serial No.: 11/471,755  
Title: THIRD-PARTY CUSTOMIZATION OF A CONFIGURATION FILE  
Filed: 6/20/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 018007/0977  
Reference No: 37202/155001; 50392
15. Patent Application/Serial No.: 11/388,641  
Title: ACCOUNTING TRANSACTIONS BY LIST  
Filed: 3/23/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 017729/0058  
Reference No: 37202/153001; 50393

16. **Patent Application/Serial No.:** 11/374,946  
**Title:** ANTI-FRAUD CHECK PRINTING  
**Filed:** 3/13/2006  
**Applicant:** Intuit Inc.  
**Reference No:** 37202/150001; 50416
17. **Patent Application/Serial No.:** 11/424,924  
**Title:** AUTOMATION OF PAYROLL TAX FILINGS  
**Filed:** 6/19/2006  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 017806/0707  
**Reference No:** 37202/154001; 50430
18. **Patent Application/Serial No.:** 11/386,228  
**Title:** LINE TRIMMING AND ARROW HEAD PLACEMENT ALGORITHM  
**Filed:** 3/21/2006  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 017725/0904  
**Reference No:** 37202/151001; 60494

**19. Patent Application/Serial No.: 11/386,581**

**Title:** CONTEXTUAL ACCESS TO  
WORKFLOW FUNCTIONALITY

**Filed:** 3/21/2006

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 017723/0365

**Reference No:** 37202/152001; 60542

**20. Patent Application/Serial No.: 10/392,993**

**Title:** DATA COLLECTION AND  
TRANSACTION INITIATION USING A  
FINANCIAL MESSAGE PORTOCOL

**Filed:** 3/19/2003

**Applicant:** Intuit Inc.

**Reference No:** 37202/130001; 60790

**21. Patent Application/Serial No.: 11/366,164**

**Title:** DATABASE SERVER DISCOVERY  
USING A CONFIGURATION FILE

**Filed:** 3/1/2006

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 017231/0128

**Reference No:** 37202/145002; 60792

**22. Patent Application/Serial No.: 11/366,775****Title:** DATABASE SERVER DISCOVERY  
USING A CONFIGURATION FILE**Filed:** 3/1/2006**Applicant:** Intuit Inc.**Reel/Frame No.:** 017231/0128**Reference No:** 37202/145003; 60793**23. Patent Application/Serial No.: 60/229,693****Title:** AUTOMATED TAX RETURN WITH  
UNIVERSAL DATA IMPORT**Filed:** 9/1/2000**Applicant:** Intuit Inc.**Reference No:** 37202/118001; 60924**24. Patent Application/Serial No.: 11/278,945****Title:** AUTOMATED TAX RETURN WITH  
UNIVERSAL DATA IMPORT**Filed:** 4/6/2006**Applicant:** Intuit Inc.**Reel/Frame No.:** 017455/0636**Reference No:** 37202/118003; 60925



25. Patent Application/Serial No.: 09/892,223  
Title: COLLECTING AND AGGREGATING  
CREDITWORTHINESS DATA  
Filed: 6/25/2001  
Applicant: Intuit Inc.  
Reel/Frame No.: 012215/0868  
Reference No: 37202/122001; 990001
26. Patent Application/Serial No.: 09/957,643  
Title: VENDOR COMPARISON,  
ADVERTISING AND SWITCHING  
Filed: 9/20/2001  
Applicant: Intuit Inc.  
Reel/Frame No.: 012525/0230  
Reference No: 37202/101001; 990002
27. Patent Application/Serial No.: 09/935,205  
Title: AUTOMATED TAX RETURN WITH  
UNIVERSAL DATA IMPORT  
Filed: 8/21/2001  
Applicant: Intuit Inc.  
Reel/Frame No.: 012549/0597  
Reference No: 37202/118002; 990005

**28. Patent Application/Serial No.: 09/900,485**

**Title:** AUTOMATED, USER SPECIFIC TAX  
ANALYSIS OF INVESTMENT  
TRANSACTIONS USING A  
PERSONAL TAX PROFILE

**Filed:** 7/6/2001

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 012548/0111

**Reference No:** 37202/102001; 990006

**29. Patent Application/Serial No.: 09/428,284**

**Title:** MULTIPLE EXCHANGE RATE  
TRACKING IN A FINANCIAL  
TRANSACTION MANAGER

**Filed:** 10/27/1999

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 010978/0371

**Reference No:** 37202/117001; 990008

**30. Patent Application/Serial No.: 09/390,138**

**Patent No.:** 6,446,048

**Title:** WEB-BASED ENTRY OF FINANCIAL  
TRANSACTION INFORMATION AND  
SUBSEQUENT DOWNLOAD OF SUCH  
INFORMATION

**Filed:** 9/3/1999

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 010414/0228

**Reference No:** 37202/114001; 990009

31. **Patent Application/Serial No.:** 09/395,867  
**Patent No.:** 6,411,938  
**Title:** CLIENT-SERVER ONLINE PAYROLL  
PROCESSING  
**Filed:** 9/14/1999  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 010379/0248  
**Reference No:** 37202/115001; 990010
32. **Patent Application/Serial No.:** 09/541,363  
**Title:** AUTOMATED ON-LINE PORTFOLIO  
GENERATION  
**Filed:** 3/31/2000  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 010718/0356  
**Reference No:** 37202/103001; 990011
33. **Patent Application/Serial No.:** 09/534,201  
**Title:** RECONCILING COMBINATIONS OF  
TRANSACTIONS  
**Filed:** 3/24/2000  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 010699/0849  
**Reference No:** 37202/119001; 990012

**34. Patent Application/Serial No.: 60/260,011****Title:** SOFTWARE MARKETPLACE WITH  
LOW BARRIERS TO ENTRY**Filed:** 1/5/2001**Applicant:** Intuit Inc.**Reference No:** 37202/120001; 990014**35. Patent Application/Serial No.: 09/755,934****Title:** METHOD AND SYSTEM FOR  
REMOPLY MANAGING BUSINESS  
AND EMPLOYEE ADMINISTRATION  
FUNCTIONS**Filed:** 1/4/2001**Applicant:** Intuit Inc.**Reel/Frame No.:** 013590/0090**Reference No:** 37202/107001; 990015**36. Patent Application/Serial No.: 10/029,765****Patent No.:** 7,117,529**Title:** IDENTIFICATION AND  
AUTHENTICATION MANAGEMENT**Filed:** 10/22/2001**Applicant:** Intuit Inc.**Reel/Frame No.:** 017171/0536**Reference No:** 37202/124001; 990016

37. **Patent Application/Serial No.:** 07/954,335  
**Patent No.:** 5,423,033  
**Title:** REPORT GENERATION SYSTEM AND METHOD  
**Filed:** 9/30/1992  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 06360/0855  
**Reference No:** 37202/110001; 990017
38. **Patent Application/Serial No.:** 08/275,038  
**Patent No.:** 5,842,185  
**Title:** METHOD AND SYSTEM FOR ELECTRONICALLY TRACKING FINANCIAL TRANSACTIONS  
**Filed:** 7/14/1994  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 6507/0980  
**Reference No:** 37202/104002; 990018
39. **Patent Application/Serial No.:** 08/019,468  
**Title:** METHOD AND SYSTEM FOR ELECTRONICALLY TRACKING FINANCIAL TRANSACTIONS  
**Filed:** 2/18/1993  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 06507/0980  
**Reference No:** 37202/104001; 990018

40. **Patent Application/Serial No.:** 08/869,580  
**Patent No.:** 5,903,881  
**Title:** PERSONAL ONLINE BANKING WITH  
INTEGRATED ONLINE STATEMENT  
AND CHECKBOOK USER INTERFACE  
**Filed:** 6/5/1997  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 8997/0587  
**Reference No:** 37202/112001; 990019
41. **Patent Application/Serial No.:** 08/252,670  
**Patent No.:** 5,649,115  
**Title:** TRACKING METHOD AND  
APPARATUS  
**Filed:** 6/2/1994  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 07038/0311  
**Reference No:** 37202/111001; 990020
42. **Patent Application/Serial No.:** 07/424,006  
**Patent No.:** 5,134,564  
**Title:** COMPUTER AIDED  
RECONCILIATION METHOD AND  
APPARATUS  
**Filed:** 10/19/1989  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 05210/0435  
**Reference No:** 37202/108001; 990021

43. Patent Application/Serial No.: 07/816,892  
Patent No.: 5,471,575  
Title: INTERACTIVE PARAMETER DRIVEN  
ITERATIVE FINANCIAL  
SPREADSHEET ANALYSIS WITH  
CONTEXT AND LAYOUT SENSITIVE  
HELP SCREEN  
Filed: 1/3/1992  
Applicant: Intuit Inc.  
Reel/Frame No.: 07863/0739, 05980/0406  
Reference No: 37202/109001; 990023
44. Patent Application/Serial No.: 10/235,896  
Title: AUTOMATED RETRIEVAL,  
EVALUATION, AND PRESENTATION  
OF CONTEXT-SENSITIVE USER  
SUPPORT  
Filed: 9/4/2002  
Applicant: Intuit Inc.  
Reel/Frame No.: 013575/0951  
Reference No: 37202/105001; 990031
45. Patent Application/Serial No.: 10/099,043  
Title: CASH GENERATION FROM  
PORTFOLIO DISPOSITION USING  
GENETIC ALGORITHMS  
Filed: 3/14/2002  
Applicant: Intuit Inc.  
Reel/Frame No.: 012709/0890  
Reference No: 37202/125001; 990032

**46. Patent Application/Serial No.:** 09/684,547

**Patent No.:** 6,745,196

**Title:** METHOD AND APPARATUS FOR  
MAPPING A COMMUNITY THROUGH  
USER INTERACTIONS ON A  
COMPUTER NETWORK

**Filed:** 10/6/2000

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 012709/0890

**Reference No:** 37202/116002; 990033

**47. Patent Application/Serial No.:** 60/158,314

**Title:** METHOD AND APPARATUS FOR  
MAPPING A COMMUNITY THROUGH  
USER INTERACTIONS ON A  
COMPUTER NETWORK

**Filed:** 10/8/1999

**Applicant:** Intuit Inc.

**Reference No:** 37202/116001; 990033

**48. Patent Application/Serial No.:** 10/105,602

**Title:** WEB-BASED ENTRY OF FINANCIAL  
TRANSACTION INFORMATION AND  
SUBSEQUENT DOWNLOAD OF SUCH  
INFORMATION

**Filed:** 3/21/2002

**Applicant:** Intuit Inc.

**Reference No:** 37202/114002; 990035



49. Patent Application/Serial No.: 10/236,332  
Title: AUTOMATED GENERATION AND  
DISPLAY OF REPORT RELATED TO  
PROSPECTIVE TRANSACTION  
Filed: 9/5/2002  
Applicant: Intuit Inc.  
Reel/Frame No.: 013275/0517  
Reference No: 37202/113001; 990036
50. Patent Application/Serial No.: 10/349,700  
Patent No.: 7,124,105  
Title: CASH FLOW OPTIMIZATION USING  
A GENETIC ALGORITHM  
Filed: 1/22/2003  
Applicant: Intuit Inc.  
Reel/Frame No.: 013709/0369  
Reference No: 37202/128001; 990037
51. Patent Application/Serial No.: 60/608,035  
Title: MY TAX HISTORY  
Filed: 9/7/2004  
Applicant: Intuit Inc.  
Reference No: 37202/143001; 990039
52. Patent Application/Serial No.: 10/360,319  
Title: UNIVERSAL PART NUMBERING  
SYSTEM  
Filed: 2/6/2003  
Applicant: Intuit Inc.  
Reel/Frame No.: 013815/0409  
Reference No: 37202/129001; 990043

**53. Patent Application/Serial No.: 10/194,183****Title:** INDIVIDUALIZED ANALYSIS AND  
PROPOSALS FOR FINANCE  
MANAGEMENT APPLICATIONS**Filed:** 7/12/2002**Applicant:** Intuit Inc.**Reel/Frame No.:** 013500/0055**Reference No:** 37202/126001; 990045**54. Patent Application/Serial No.: 10/722,118****Title:** EXPORTABLE REPORT TEMPLATES**Filed:** 11/24/2003**Applicant:** Intuit Inc.**Reel/Frame No.:** 014684/0803**Reference No:** 37202/127002; 990050**55. Patent Application/Serial No.: 60/317,552****Title:** CONTEXT-SENSITIVE USER-  
SUPPORTED DATABASE**Filed:** 9/5/2001**Applicant:** Intuit Inc.**Reel/Frame No.:** 012427/0164**Reference No:** 37202/123001; 990052**56. Patent Application/Serial No.: 10/667,090****Title:** LOAN ASSISTANT**Filed:** 9/18/2003**Applicant:** Intuit Inc.**Reel/Frame No.:** 014322/0635**Reference No:** 37202/131001; 990056

**57. Patent Application/Serial No.: 10/753,756**

**Title:** AUTOMATING SETUP OF A USER'S  
FINANCIAL MANAGEMENT  
APPLICATION ACCOUNT FOR  
ELECTRONIC TRANSFER OF DATA  
WITH A FINANCIAL INSTITUTION

**Filed:** 1/7/2004

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 014752/0362

**Reference No:** 37202/133001; 990058

**58. Patent Application/Serial No.: 10/692,702**

**Title:** EDITABLE HYPERTEXT CONTROL

**Filed:** 10/24/2003

**Applicant:** Intuit Inc.

**Reference No:** 37202/132001; 990060

**59. Patent Application/Serial No.: 11/104,049**

**Title:** PORTFOLIO PERFORMANCE  
TRACKING

**Filed:** 4/11/2005

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 016476/0204

**Reference No:** 37202/139001; 990061

60. Patent Application/Serial No.: 10/756,736  
Title: METHOD AND SYSTEM FOR  
BACKFILLING TRANSACTIONS IN  
AN ACCOUNT  
Filed: 1/12/2004  
Applicant: Intuit Inc.  
Reel/Frame No.: 014888/0340  
Reference No: 37202/134001; 990064
61. Patent Application/Serial No.: 60/559,169  
Title: MISSING DATA COLLECTION  
Filed: 4/1/2004  
Applicant: Intuit Inc.  
Reference No: 37202/135001; 990067-PRV
62. Patent Application/Serial No.: 10/982,661  
Title: AUTOMATED DATA RETRIEVAL  
Filed: 11/4/2004  
Applicant: Intuit Inc.  
Reel/Frame No.: 015877/0657  
Reference No: 37202/135002; 990067
63. Patent Application/Serial No.: 10/916,668  
Title: BILL PAYMENT OPTIMIZATION  
USING A GENETIC ALGORITHM  
Filed: 8/11/2004  
Applicant: Intuit Inc.  
Reel/Frame No.: 015708/0459  
Reference No: 37202/128002; 990068

64. Patent Application/Serial No.: 10/856,646  
Patent No.: 6,963,879  
Title: METHOD AND APPARATUS FOR  
MAPPING A COMMUNITY THROUGH  
USER INTERACTIONS ON A  
COMPUTER NETWORK  
Filed: 5/27/2004  
Applicant: Intuit Inc.  
Reel/Frame No.: 016542/0549  
Reference No: 37202/116003; 990073
65. Patent Application/Serial No.: 11/264,368  
Title: STORING ON A CLIENT DEVICE  
DATA PROVIDED BY A USER TO AN  
ONLINE APPLICATION  
Filed: 10/31/2005  
Applicant: Intuit Inc.  
Reel/Frame No.: 017484/0244  
Reference No: 37202/144001; 990075
66. Patent Application/Serial No.: 11/036,269  
Title: PROACTIVE TAX PREPARATION  
Filed: 1/13/2005  
Applicant: Intuit Inc.  
Reel/Frame No.: 016193/0311  
Reference No: 37202/135003; 990078

**67. Patent Application/Serial No.:** 09/805,321

**Title:** SYSTEM AND METHOD FOR  
TRACKING CHARITABLE  
DEDUCTIONS

**Filed:** 3/13/2001

**Applicant:** Intuit Inc.

**Reference No:** 37202/121001; 990081

**68. Patent Application/Serial No.:** 11/222,026

**Title:** PREDICTIVE TAX PREPARATION

**Filed:** 9/7/2005

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 016743/0935

**Reference No:** 37202/143002; 990083

**69. Patent Application/Serial No.:** 11/283,560

**Title:** QUANTITY AVAILABILITY FOR  
INVENTORY ITEMS

**Filed:** 11/17/2005

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 017272/0630

**Reference No:** 37202/146001; 990086

70. **Patent Application/Serial No.:** 09/662,233  
**Title:** DYNAMICALLY RESIZEABLE  
DISPLAY ELEMENTS  
**Filed:** 9/14/2000  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 011104/0724  
**Reference No:** 37202/078001; 990087
71. **Patent Application/Serial No.:** 09/580,670  
**Title:** MANAGING MULTIPLE LIFE CYCLE  
PLANS  
**Filed:** 5/26/2000  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 011254/0220  
**Reference No:** 37202/099001; 990088
72. **Patent Application/Serial No.:** 11/534,532  
**Title:** FLOW CONTROL INFORMATION  
FOR A MODEL-DRIVEN USER  
INTERVIEW  
**Filed:** 9/22/2006  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 18344/0198  
**Reference No:** 37202/138003; 060909

73. Patent Application/Serial No.: 11/534,540  
Title: PROMPTS FOR A MODEL-DRIVEN  
USER INTERVIEW  
Filed: 9/22/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 18344/0198  
Reference No: 37202/138004; 060910
74. Patent Application/Serial No.: 11/534,544  
Title: USER INTERFACE FOR A MODEL-  
DRIVEN USER INTERVIEW  
Filed: 9/22/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 18344/0198  
Reference No: 37202/138005; 060911
75. Patent Application/Serial No.: 11/534,554  
Title: USING AN INSTANTIATED MODEL  
TO GENERATE AN APPLICATION-  
SPECIFIC DOCUMENT  
Filed: 9/22/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 018344/0198  
Reference No: 37202/138006; 060912



76. **Patent Application/Serial No.:** 11/479,197  
**Title:** PUSH DEBIT/CREDIT PAYMENTS TO BILLERS  
**Filed:** 6/29/2006  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 018032/0614  
**Reference No:** 37202/156001; 60540
77. **Patent Application/Serial No.:** 60/516,663  
**Title:** INTERNET ENHANCED SHOPPING SYSTEM  
**Filed:** 10/31/2003  
**Applicant:** Intuit Inc.  
**Reference No:** 37202/075001; 071364
78. **Patent Application/Serial No.:** 10/651,921  
**Title:** METHOD OF AND APPARATUS FOR PERFORMING A DATA TRANSFER OPERATION BY MONITORING CONDITIONS DURING THE TRANSFER AND DYNAMICALLY ADJUSTING PARAMETERS CONTROLLING THE TRANSFER  
**Filed:** 8/29/2003  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 014838/0303  
**Reference No:** 37202/095001; 061245